



# **EDUCATIONAL OPPORTUNITY GRANT**

## **PROGRAM MANUAL**

**2004-2005**

# **EDUCATIONAL OPPORTUNITY GRANT PROGRAM MANUAL**

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# EDUCATIONAL OPPORTUNITY GRANT

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# **EDUCATIONAL OPPORTUNITY GRANT PROGRAM**

## **TIMELINE**

<b>November 2003</b>	2004-05 Applications available for Administrators.
<b>March 2004</b>	Program promotion at transfer career fairs.
<b>May 2004</b>	2004-05 Tentative Renewal Forms due from schools.
<b>May 2004</b>	2004-05 Notice of Awards to Community College President.
<b>August 2004</b>	2004-05 Final Renewal Forms due from schools.
<b>August-Sept 2004</b>	2004-05 Fall quarter / Fall semester warrants sent to schools.
<b>September 2004</b>	Mail 2005-06 program brochures to all two and four-year schools, libraries, and community organizations.
<b>November 2004</b>	Mail 2005-06 applications to all two and four-year schools and community organizations.
<b>January 2005</b>	Winter quarter 2005 / Spring semester 2005 Payments sent to schools.
<b>February 2005</b>	Mail 2005-06 renewal information to 04-05 first-time recipients and schools.
<b>March 2005</b>	Spring quarter 2005 warrants sent to schools. 2005-06 Petition for Funding Above Normal Limits sent to schools. Summer 2005 announcement sent to schools and students.
<b>April 1, 2005</b>	2005-06 new application priority deadline, monthly thereafter.
<b>April 2005</b>	Review of 2005-06 applications begins. 2005-06 Award notification sent to students and schools.
<b>April 26, 2005</b>	2005-06 Initial renewal confirmation due from schools.
<b>April 30, 2005</b>	2005-06 Renewal verification sent to students and schools.
<b>May 18, 2005</b>	Summer 2005 Requests due.
<b>June 2005</b>	Summer 2005 warrants sent to schools.
<b>August 16, 2005</b>	2005-06 Final renewal changes due from schools.

**Note: Petitions for grants Above Normal Limits accepted year-round on a funds available basis and must arrive two months before term begins.**

**Chapter 28B.101 RCW**  
**Educational Opportunity Grant Program**  
(see caveat)

<i>Sections</i>	
<b>28B.101.005</b>	<b>Finding -- Intent.</b>
<b>28B.101.010</b>	<b>Program Created.</b>
<b>28B.101.020</b>	<b>Definition -- Eligibility.</b>
<b>28B.101.030</b>	<b>Administration of Program -- Payments to Participants.</b>
<b>28B.101.040</b>	<b>Use of Grants.</b>

**RCW 28B.101.005 Finding -- Intent.**

The legislature finds that many individuals in the state of Washington have attended college and received an associate of arts or associate of science degree, or the equivalent, but are placebound.

The legislature intends to establish an educational opportunity grant program for placebound students who have completed an associate of arts or associate of science degree, or the equivalent, in an effort to increase their participation in and completion of upper-division programs.

[2003 c 233 § 1; 1990 c 288 § 2.]

**RCW 28B.101.010 Program Created.**

The educational opportunity grant program is hereby created to serve placebound financially needy students by assisting them to obtain a baccalaureate degree at public and private institutions of higher education approved for participation by the higher education coordinating board.

[2003 c 233 § 2; 1990 c 288 § 3.]

**RCW 28B.101.020 Definition -- Eligibility.**

(1) For the purposes of this chapter, "placebound" means unable to complete a college program because of family or employment commitments, health concerns, monetary inability, or other similar factors.

(2) To be eligible for an educational opportunity grant, applicants must be placebound residents of the state of Washington as defined in RCW 28B.15.012(2) (a) through (d), who: (a) Are needy students as defined in RCW 28B.10.802(3); and (b) have completed the associate of arts or associate of science degree or the equivalent. A placebound resident is one who may be influenced by the receipt of an enhanced student financial aid award to complete a baccalaureate degree at an eligible institution. An eligible placebound applicant is further defined as a person who would be unable to complete a baccalaureate course of study but for receipt of an educational opportunity grant.

[2003 c 233 § 3; 1990 c 288 § 4.]

### **RCW 28B.101.030 Administration of Program -- Payments to Participants.**

The higher education coordinating board shall develop and administer the educational opportunity grant program. The board shall adopt necessary rules and guidelines and develop criteria and procedures to select eligible participants in the program. Payment shall be made directly to the eligible participant periodically upon verification of enrollment and satisfactory progress towards degree completion.

[1990 c 288 § 5.]

### **RCW 28B.101.040 Use of Grants.**

Grants may be used by eligible participants to attend any public or private college or university in the state of Washington that is accredited by an accrediting association recognized by rule of the higher education coordinating board for the program and that complies with eligibility criteria established by rule of the higher education coordinating board. The participant shall not be eligible for a grant if it will be used for any programs that include religious worship, exercise, or instruction or to pursue a degree in theology. Each participating student may receive up to two thousand five hundred dollars per academic year, not to exceed the student's demonstrated financial need for the course of study.

[2003 c 233 § 4; 2002 c 186 § 3. Prior: 1993 sp.s. c 18 § 35; 1993 c 385 § 2; 1990 c 288 § 6.]

### **NOTES:**

**Effective date -- 1993 sp.s. c 18:** See note following RCW 28B.10.265.

## **Residency Statute Excerpt for Educational Opportunity Grant Program**

### **RCW 28B.101 Educational Opportunity Grant**

The purposes of RCW 28B.101.005 through 28B.101.040 are to establish the principles upon which the state of Washington Educational Opportunity Grant program, will assist financially needy, placebound students domiciled in Washington to obtain the opportunity of attending an eligible institution of higher education. RCW 28B.101.020 defines Washington residents as those defined in RCW 28B.15.012 (2)

(a) through (d).

### **RCW 28B.15.012 Classification as resident or nonresident student – Definitions**

Whenever used in chapter 28B.15 RCW:

- (1) The term "institution" shall mean a public university, college, or community college within the state of Washington.
- (2) The term "resident student" shall mean:
  - (a) A financially independent student who has had a domicile in the state of Washington for the period of one year immediately prior to the time of commencement of the first day of the semester or quarter for which the student has registered at any institution and has in fact established a bona fide domicile in this state primarily for purposes other than educational;
  - (b) A dependent student, if one or both of the student's parents or legal guardians have maintained a bona fide domicile in the state of Washington for at least one year immediately prior to commencement of the semester or quarter for which the student has registered at any institution;
  - (c) A student classified as a resident based upon domicile by an institution on or before May 31, 1982, who was enrolled at a state institution during any term of the 1982-1983 academic year, so long as such student's enrollment (excepting summer sessions) at an institution in this state is continuous;
  - (d) Any student who has spent at least seventy-five percent of both his or her junior and senior years in high schools in this state, whose parents or legal guardians have been domiciled in the state for a period of at least one year within the five-year period before the student graduates from high school, and who enrolls in a public institution of higher education within six months of leaving high school, for as long as the student remains continuously enrolled for three quarters or two semesters in any calendar year;

**Chapter 250-70 WAC**  
**Educational Opportunity Grant Program**  
**Last Update: 9/03**

<b>WAC</b>	
<b>250-70-010</b>	<b>Purpose.</b>
<b>250-70-020</b>	<b>Program definitions.</b>
<b>250-70-030</b>	<b>Institutional eligibility.</b>
<b>250-70-040</b>	<b>Student eligibility.</b>
<b>250-70-050</b>	<b>Application procedure.</b>
<b>250-70-060</b>	<b>Recipient selection and award.</b>
<b>250-70-070</b>	<b>Grant amount disbursement limits.</b>
<b>250-70-080</b>	<b>Program administration.</b>
<b>250-70-090</b>	<b>Student responsibilities.</b>
<b>250-70-100</b>	<b>Repayment option.</b>

**WAC 250-70-010 Purpose.**

Recognizing that Washington state experiences low participation rates at the upper-division level within postsecondary education, the legislature has authorized the educational opportunity grant program.

The purpose of the educational opportunity grant program is to serve eligible placebound financially needy Washington residents who have completed an associate of arts or associate of science degree, or the equivalent, enabling them to participate in and complete upper-division study at eligible institutions approved for participation by the higher education coordinating board.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-010, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-010, filed 7/20/90, effective 8/20/90.]

**WAC 250-70-020 Program definitions.**

(1) "Placebound" shall mean unable to complete a college program because of family or employment commitments, health concerns, monetary inability, or other similar factors.

(2) "Placebound resident" shall mean a person who, because of family or employment commitments, health concerns, monetary need, or other similar factors, would be presumed unable to complete an upper-division course of study but for receipt of an educational opportunity grant. A placebound resident is one who may be influenced by the receipt of an enhanced student financial aid award to attend an eligible institution approved for participation in the program by the higher education coordinating board.

(3) "Demonstrated financial need" shall mean the difference between the budgetary cost to the student attending the institution of postsecondary education and the total applicant resources which the institutional financial aid officer determines can reasonably be expected to be available to the student for meeting such costs.

(4) "Needy student" shall mean those students as defined in RCW 28B.10.802(3), and as otherwise defined by the board.

(5) "Washington resident or resident student" shall mean an individual who at the time of application for an educational opportunity grant satisfies the requirements of RCW 28B.15.012 (2)(a) through (d) and board-adopted rules and regulations pertaining to the determination of state residency.

(6) "Associate of arts or associate of science degree or the equivalent" shall mean coursework comparable to admission at the junior level or above by the enrolling institution.

(7) "Upper division" shall mean baccalaureate coursework beyond an associate of arts degree or its equivalent.

(8) "Award amount" shall mean an award amount up to \$2,500 per academic year per student, prorated per term of attendance, paid periodically in equal installments, not to exceed the student's demonstrated financial need.

(9) "Academic year" shall generally mean a nine-month period (three quarters or two semesters).

(10) "Board" shall mean the higher education coordinating board. When a duty or responsibility of the board is referenced in these regulations, the authority needed to discharge that responsibility lies with the executive director or his or her designee.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-020, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-020, filed 7/20/90, effective 8/20/90.]

### **WAC 250-70-030 Institutional eligibility.**

To qualify as an eligible institution for purposes of this program an institution shall:

(1) Be a public or private postsecondary educational institution in the state of Washington accredited by the Northwest Association of Schools and Colleges; or a branch campus of a member institution accredited by Middle States Association of Colleges and Schools, New England Association of Schools and Colleges, North Central Association of Colleges and Schools, Southern Association of Colleges and Schools, or Western Association of Schools and Colleges that is eligible for federal student financial aid assistance, have operated as a nonprofit college or university delivering on-site classroom instruction for a minimum of twenty consecutive years in the state of Washington, and have an annual enrollment of at least seven hundred full-time equivalent students.

(2) Complete an agreement to participate acknowledging its responsibility to administer the educational opportunity grant program according to prescribed rules and regulations and guidelines, and otherwise give evidence of its eligibility, if necessary.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-030, filed 9/25/03, effective 10/26/03. Statutory Authority: Chapters 28B.80 and 28B.101 RCW. 93-19-024, § 250-70-030, filed 9/3/93, effective 10/4/93. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-030, filed 7/20/90, effective 8/20/90.]

### **WAC 250-70-040 Student eligibility.**

A placebound student is eligible for an educational opportunity grant if the additional financial resource would alleviate the placebound condition by allowing the student access to education at an eligible institution. For a student to be eligible for an educational opportunity grant he or she must:

- (1) Be a "financially needy student" as determined by the higher education coordinating board in accordance with RCW 28B.10.802(3);
- (2) Be a resident of the state of Washington;
- (3) Be enrolled or accepted for enrollment at least half time, with priority to full-time enrollment, as an upper-division undergraduate student at an eligible baccalaureate institution in the state of Washington;
- (4) Be a placebound resident;
- (5) Have completed an associate of arts or associate of science degree or the equivalent;
- (6) Not be required by the institution to be involved in a program that includes any religious worship, exercise or instruction;
- (7) Make satisfactory academic progress as determined by the institution; and
- (8) An otherwise eligible student may not apply for this grant to continue enrollment at an institution where he or she is presently attending.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-040, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-040, filed 7/20/90, effective 8/20/90.]

### **WAC 250-70-050 Application procedure.**

Placebound students shall initially apply directly to the higher education coordinating board and shall complete an application and other materials as provided and required by the board.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-050, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-050, filed 7/20/90, effective 8/20/90.]

### **WAC 250-70-060 Recipient selection and award.**

In selecting grant recipients, the board will give priority to those students who, but for this grant, evidence that they could not pursue a baccalaureate degree.

- (1) Determination. The higher education coordinating board shall determine student eligibility and awards under this program. The board will convene as necessary an advisory committee to work with the board on matters of program policy and administration including, but not limited to: Award screening, selection criteria, administrative procedures, program publicity, and efforts

to recruit placebound students.

(2) Standards. Assuming program eligibility criteria are met, the following additional selection criteria, among others, may be employed in ranking candidates and awarding grants:

(a) Evidence that, but for this grant, a placebound student could not pursue baccalaureate study at an eligible institution of the student's choice;

(b) Evidence of financial hardship or significant educational debt; and

(c) Information describing the student's educational goals and plans.

A student may ultimately choose an eligible institution different from that referenced in his or her application, provided the board and the receiving eligible institution can verify student eligibility criteria such as placebound status, certification of enrollment in an eligible academic program, documented financial need and satisfactory academic progress status. To deliver an incentive for recipients, the institution agrees to package the grant as "self-help."

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-060, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-060, filed 7/20/90, effective 8/20/90.]

#### **WAC 250-70-070 Grant amount disbursement limits.**

Grant disbursement shall be made to the eligible enrolled student in equal amounts per term upon institutional verification of the student's enrollment in an eligible program, proof of financial need and satisfactory academic progress. The award amount shall not exceed \$2,500 per academic year. The value of the grant shall be the same regardless of the institution selected. Students may be awarded grants for up to eight quarters (or equivalent) of study. Renewability will not be forfeited if a student stops out for a single term during the academic year. However, students who fail to attend for more than one regular academic term during the period of their award will be required to reapply for the grant. If they are reawarded, previous terms of enrollment during which they received the grant will count toward their total eligibility.

The educational opportunity grant, when combined with the state share of other state-appropriated student financial aid programs, shall not exceed an amount equal to the total maximum student expense budget at the public research institutions plus the current average state appropriation per student for operating expense in the public institutions.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-070, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-070, filed 7/20/90, effective 8/20/90.]

#### **WAC 250-70-080 Program administration.**

(1) Administering agency. The higher education coordinating board shall administer the educational opportunity grant program. The staff of the board, under the direction of the executive director, will manage the administrative functions relative to the program and shall be authorized to enter into agreement with eligible institutions for participation in the program.

(2) Maintenance of effort. State funds provided under this program are not to be used to supplant federal, state or institutional grants which would otherwise be available to support the

student's attendance.

(3) Reports. The higher education coordinating board will obtain periodic reports from institutions describing the number of educational opportunity grant recipients selecting that institution, the socio-economic profile of such recipients in attendance at each participating institution, and other information about the student's academic program pertinent to these rules.

(4) Oversight and appeals. If an institution fails to maintain eligibility for the program as defined in WAC 250-70-020, or if the board determines that an institution has failed to comply with program rules and regulations or guidelines, the board may suspend, terminate, or place conditions upon the institution's participation in the program. Satisfactory resolution of a dispute will be attempted by board staff. If satisfactory resolution cannot be achieved by board staff, the institution initiating the appeal may request a hearing with the board, which shall take action on the appeal. Eligible applicants may request in writing a review of any adverse decision affecting them by requesting such review within 20 days of the adverse decision, addressed to the executive director of the higher education coordinating board. In both circumstances, the appeal shall be conducted consistent with the terms of the Administrative Procedure Act, chapter 34.05 RCW.

[Statutory Authority: RCW 28B.240 and .370 [28B.80.240 and 28B.80.370] and 28B.101.030. 03-20-047, § 250-70-080, filed 9/25/03, effective 10/26/03. Statutory Authority: 1990 c 288. 90-16-023, § 250-70-080, filed 7/20/90, effective 8/20/90.]

#### **WAC 250-70-090 Student responsibilities.**

(1) A student must meet the academic progress required under terms of this program.

(2) A student who has incorrectly submitted information on his or her application, shall be required to repay grant funds to the program.

(3) Any student who has obtained an educational opportunity grant through means of a willfully false statement or failure to reveal any material fact, condition, or circumstance affecting eligibility will be subject to applicable civil or criminal penalties.

[Statutory Authority: 1990 c 288. 90-16-023, § 250-70-090, filed 7/20/90, effective 8/20/90.]

#### **WAC 250-70-100 Repayment option.**

It is the intent of this legislation that nothing in this act shall prevent or discourage an individual from making an effort to repay any state financial aid awarded during his or her collegiate career.

[Statutory Authority: 1990 c 288. 90-16-023, § 250-70-100, filed 7/20/90, effective 8/20/90.]

## **Chapter I**

### **STUDENT AND INSTITUTIONAL ELIGIBILITY**

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**STUDENT  
ELIGIBILITY  
REQUIREMENTS**

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To be eligible for Educational Opportunity Grant (EOG) consideration, the student must:

1. Demonstrate financial need and have filed a Free Application for Federal Student Aid (FAFSA).
2. Be a resident of the state of Washington.
3. Be "Placebound".
4. Plan to enroll full-time. Extenuating circumstances may allow for half-time enrollment. Full-time students receive priority for funding.
5. Enroll in an eligible program at a Board approved four-year college or university in Washington State.
6. Have achieved at least junior standing as recognized by the college the student plans to attend, by completing an Associate of Arts or Associate of Science degree or the equivalent.
7. Not be pursuing a degree in theology.
8. Not be required by the college or university to be involved in any program that includes any religious worship, exercise or instruction.
9. First year recipients cannot have been enrolled during the prior academic year at the institution the student plans to attend with the EOG grant.
10. Be making satisfactory progress according to the college or university.
11. Not owe a repayment or be in default to any state or federal financial aid program.
12. Not have exhausted the limit of eight quarters, or equivalent, of Educational Opportunity Grant eligibility.

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## DEFINITIONS

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### **Need**

The student must demonstrate financial need as calculated by the institution, completing a Free Application for Federal Student Aid using the Federal Methodology (FM) formula. The student's EOG award in combination with other forms of aid may not exceed the calculated need. The student's financial aid package must be complete before the award will be disbursed.

### **Packaging**

The EOG award may not exceed the students' calculated need and **must replace unmet need or self-help assistance**.

### **State Resident**

"Resident" means being a resident of the state of Washington as defined in RCW 28B.15.012(2) (a) through (d). The Statute section of the manual contains an excerpt of RCW 28B.15.012(2)(a) through (d).

### **Placebound Definition**

For purposes of this program, a placebound citizen shall mean a person who, because of family or employment commitments, health concerns, monetary need, or other similar factors, would be presumed unable to complete an upper-division course of study but for receipt of an educational opportunity grant. A placebound resident is one who may be influenced by the receipt of an enhanced student financial aid award to attend an eligible institution approved for participation in the program by the higher education coordinating board.

### **Theology Major**

A student is best advised to contact the institution he plans to attend to determine whether the institution considers the major course(s) of study he wishes to pursue to be theology major(s) for which its students are ineligible to receive state financial aid.

### **Religious Worship, Exercise, or Instruction**

The individual institutions must make this determination in light of the Washington State Constitution, which provides in part at Article 1 § 11 that no "public money or property shall be appropriated for or applied to any religious worship, exercise or instruction". In applying this constitutional prohibition, the institutions may look to decisions of the Washington Supreme Court, which have interpreted the constitutional provision as prohibiting "that category of instruction that resembles worship and manifests a devotion to religion and religious principles in thought, feeling, belief, and conduct, i.e., instruction that is devotional in nature and designed to induce faith and belief in the student."

<b>Enrolled</b>	<p>"Enrolled" means being enrolled or accepted for enrollment as at least a half-time upper-division undergraduate student at a participating postsecondary institution.</p> <p>"Half-time" means six credits per term.</p> <p>No more than one-half of the student's course load per term may be through correspondence courses.</p>
<b>Correspondence &amp; Distance Education Courses</b>	<p>No more than one-half of the students course load per term may be through correspondence courses. Currently, there are no special rules prohibiting the receipt of EOG by eligible students enrolled in electronically delivered distance education coursework offered by eligible institutions.</p>
<b>Academic Year</b>	<p>The Academic Year is equal to the fall, winter, and spring terms at a quarter institution; fall and spring terms at a semester school.</p>
<b>Upper Division Undergraduate Status</b>	<p>"Upper Division Undergraduate student" means a student who has not been conferred a first baccalaureate or professional degree but has completed an Associate of Arts or Associate of Science degree or achieved at least junior standing as recognized by the college.</p>
<b>Refund/Repayment</b>	<p>All students must certify that they do not owe a refund and are not in repayment for a state or federal student financial aid program including an Educational Opportunity Grant, a State Need Grant, Pell Grant, or Supplemental Educational Opportunity Grant, and are not in default on a loan made, insured, or guaranteed under the federal Perkins Loan, or STAFFORD FFEL or Direct Loan programs or made through a state conditional loan program.</p>
<b>Two-Year Eligibility Equivalent</b>	<p>The Educational Opportunity Grant is designed as a six-quarter or four-semester program to assist upper-division students to complete a baccalaureate degree and to do so in a timely manner.</p>
<b>Regular Renewals</b>	<p>The award can be renewed for remaining available terms of the two-year period if the student's placebound condition has not changed markedly and the financial need is confirmed in the new aid year. Schools will confirm the student's eligibility for renewal.</p>

**Petition for Funding  
Above Normal Limits**

In exceptional cases, the award may be extended for an additional two terms up to an absolute max of eight quarters or its equivalent. Students may petition for funding above normal limits. Students request a petition form from their financial aid office. Petitions will be reviewed based on circumstances presented and funds available.

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**MONITORING  
ELIGIBILITY**

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Institutions are responsible for monitoring and responding to changes in student eligibility which may affect the Educational Opportunity Grant award. "Monitoring Continued Eligibility" in Chapter III discusses procedures for changes in student status which occur after receipt of an award.

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**PENALTY  
FOR FALSE  
INFORMATION**

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Any student who has obtained an Educational Opportunity Grant through means of a willfully false statement or failure to reveal any material fact, condition, or circumstance affecting eligibility will be subject to applicable civil and criminal penalties.

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**INSTITUTIONAL  
ELIGIBILITY**

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For a school to be eligible to participate in the Educational Opportunity Grant program, it must:

1. Be a public or private college or university in the state of Washington that is accredited by an accrediting association recognized by rule of the Higher Education Coordinating Board and that can comply with eligibility criteria established by rule of the Higher Education Coordinating Board.
2. Participate in the federal student aid programs.
3. Demonstrate a continuing administrative capability to steward financial aid programs.
4. Sign and have approved by the Higher Education Coordinating Board, the "Institutional Agreement to Participate" and an "Electronic Access Agreement" that among other provisions, includes certification that the institution will not require any recipient of the grant to be involved in any educational program that includes any religious worship, exercise, or instruction.

**Eligible Program**

"Eligible program" means a program at a location approved by the U.S. Department of Education for participation in the federally-funded financial aid programs.

The student, at a public or private, nonprofit institution, must be enrolled in an educational program which leads to a baccalaureate degree.

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**UNIT RECORD**

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Each institution participating in the Educational Opportunity Grant program must submit a Unit Record Report for each student who received federal, state, or other financial aid on the basis of financial need including this program. Information to be reported includes the disbursed EOG grant amount, socioeconomic data and financial aid packaging information for each aid recipient. The reports must be filed in a format required by the Board and submitted by the announced deadline.

## Chapter II

### APPLICATION AND AWARD SELECTION

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#### APPLICATIONS

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Students must submit an application in order to initially apply for the Educational Opportunity Grant (EOG). *(See sample application in Resources section. Applications are also available on-line at: <http://www.hecb.wa.gov/paying/waaidprgm/eog-2004-05-application.pdf>)*

Applications are issued by the Higher Education Coordinating Board and consist of three parts. The student must complete Parts A and B and submit Part C to the school's financial aid office for completion.

Completed Parts A and B may be submitted directly to the Higher Education Coordinating Board or submitted to the school who will then forward all application parts together to the Board.

#### Placebound Circumstances

As part of the application, the student must submit Part B to have their placebound status assessed. Answers to placebound questions will determine if the applicant meets or does not meet the terms of the placebound definition. Students may also describe any special circumstances or factors that limit their ability to complete a four year degree.

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#### SELECTION AND AWARD

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##### Selection Process

EOG applications are prescreened by staff for completeness and eligibility.

Working in cooperation with schools and colleges, the Board developed an application tool (Part B) to measure a student's placebound circumstances. Applications are scored at the Board for an applicant's "placebound" status and the student's financial need.

##### Funding Priorities

Priorities for available funding are as follows:

1. Continuing students (second year students)
2. New full-time applicants
3. Petitions for funding above normal limits

All applicants are notified by letter of their award status. The school for which the student indicated a first preference is also notified of the award.

<b>Alternates</b>	In the event that funds become available few alternate candidates will be selected and notified of their alternate status.
<b>Packaging Requirements</b>	The EOG award may never exceed the student's total calculated need, <b>and to operate as an incentive, must replace unmet need or self-help assistance.</b> The aid administrator must, at the time of notice of the EOG award, review the student's package to ensure compliance with program requirements.
<b>Enrollment Transfer</b>	Transfer of a grant to another school is not automatic. Recipients who wish to transfer must complete a new placebound description and submit Part C of the application completed by the new school. This information will be reviewed by program staff to determine if the recipient still meets the conditions for an award.
<b>Part-Time Students</b>	Priority for a first-time award is given to applicants attending full-time, but recipients are still eligible to receive the award if they enroll for at least half-time. If a recipient drops to less than full-time status but is enrolled at least half-time (6 credits or the equivalent), the award amount is conditional on the cost of attendance. If the cost of attendance is significantly reduced and the student's self-help financial need drops below \$2,500, the award will be reduced. Students enrolling for less than six credits are not eligible for the grant.
<b>Attendance Less Than Nine Months</b>	Students attending only part of the full nine-month academic year receive a prorated share of the total award. For example, the student attending one of three quarters receives one-third of the full year's total EOG award.
<b>Lack of Junior Status</b>	The December 2000 program evaluation anticipated and approved exception to the requirement for Junior standing for the student finishing a course or two at the community college while beginning enrollment at the four-year institution. These students will receive the grant for one term but must obtain Junior status by end of the first term the grant is received or they will be ineligible for future awards.
<b>Summer Awards</b>	Summer term awards are made when funds are available. Students must notify their institution they plan to enroll summer term and wish to continue receiving the grant.

## **Chapter III**

### **MONITORING CONTINUED ELIGIBILITY**

Once a student receives an Educational Opportunity Grant award the institution must monitor for continued eligibility. The student must:

1. Continue to meet the basic Student Eligibility Requirements outlined in Chapter I.
2. Be monitored for satisfactory progress while receiving the grant.

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#### **STUDENT ELIGIBILITY REQUIREMENTS**

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Chapter I outlines the conditions a student must meet to be considered for an Educational Opportunity Grant. The student must meet these conditions throughout the aid year. These conditions include having financial need; being a Washington resident; enrolling in an eligible program and an eligible school; being an undergraduate upper-division student or having a A.A. or A.S. degree; not owing a refund or repayment on any state or federal program; not be required by the institution to be involved in any program that includes any religious worship, exercise, or instruction; and not being enrolled during the initial year in the same school as in the prior year.

If the student's eligibility changes during the year, the institution is expected to notify the Higher Education Coordinating Board to make the corresponding changes to the Educational Opportunity Grant award.

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#### **FINANCIAL NEED**

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The institution is expected to monitor the student's overall need for assistance and continuing need for the Educational Opportunity Grant.

#### **Revised Eligibility**

In general, it is a good practice to recalculate the student's eligibility for the Educational Opportunity Grant whenever a recalculation is required for federal student aid programs. At a minimum, however, the student's Educational Opportunity Grant must be revised whenever changes to the applicant information would result in a reduction in the award by \$50 or more. If applicable, a revised award letter would include notification of any overpayment.

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**SATISFACTORY  
PROGRESS**

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The institution is expected to monitor the student's progress as outlined in Section 250-70-040(8) of the Educational Opportunity Grant rules and in accordance with the Board-approved institutional policy, which should include both qualitative and quantitative standards.

**Professional  
Judgment**

The Financial Aid Administrator (FAA) may at any time, using professional judgment on a case-by-case basis, reinstate a student into satisfactory progress in response to an individual student's extenuating circumstances. The FAA can choose to exercise professional judgment without a specific request to do so from the student. For example, the FAA may decide to permit a student continued access to the Educational Opportunity Grant if failure in one term is countered by an extensive history of prior success.

**Withholding  
Payment**

Consistent with institutional policy for the administration of its other financial aid programs, an institution may withhold payment of an Educational Opportunity Grant to a student who has earned sufficient credits for, but has not been conferred, a first baccalaureate or professional degree.

---

**OVERPAYMENTS**

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If the overpayment can be eliminated in the award year in which it occurred by adjusting the subsequent grant payments, the student can continue to receive funds as long as he or she is otherwise eligible. If the overpayment cannot be resolved in this manner, the student is obligated to return the amount of the overpayment.

Terms Used		Intended Limit		Maximum Limit	
<i>Quarters Used</i>	<i>Semesters Used</i>	<i>Quarters Remaining</i>	<i>Semesters Remaining</i>	<i>Quarters Remaining</i>	<i>Semesters Remaining</i>
0	0	6	4	8	6
1	0	5	4	6	5
2	0	4	3	7	4
3	0	3	2	5	3
4	0	2	2	4	2
5	0	1	1	3	1
6	0	0	0	2	1
7	0	0	0	1	0
8	0	0	0	0	0
0	1	5	3	6	5
0	2	3	2	5	4
0	3	2	1	4	3
0	4	0	0	3	2
0	5	0	0	1	1
0	6	0	0	0	0
1	1	4	3	5	4
1	2	2	2	4	3
1	3	1	1	3	2
1	4	0	0	2	1
2	1	3	2	4	3
2	2	1	1	3	2
2	3	0	0	2	1
2	4	0	0	1	0
3	1	2	2	3	2
3	2	0	0	2	1
4	1	1	1	2	1
4	2	0	0	1	0
5	1	0	0	1	0

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**CONTINUING  
TERMS OF  
ELIGIBILITY**

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The above chart details the matrix that will be applied to determine continuing eligibility for students based on previously explained program limits. “Terms used” includes awarded and paid terms along with committed but not yet paid terms. “Intended Limit” is an expression of the normal timeframe of eligibility.

## Chapter IV

### PAYMENT PROCEDURES

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#### DISBURSEMENT PROCEDURES

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##### **Eligibility Confirmation**

The Board will send institutions a list of EOG eligible students (new and renewed) in August, prior to the beginning of fall term.

##### **Public**

**Public** institutions can credit Educational Opportunity Grant funds to the student's account consistent with procedures for disbursing other financial aid. EOG funds will be delivered each term to public institutions in the form of an electronic funds transfer accompanied by an invoice listing of awarded students.

##### **Private**

**Private** institutions must disburse Educational Opportunity Grant checks (warrants) directly to the student. Each student must be provided the opportunity to cash the check at his or her own bank or to request that the funds be applied to the student's account at the institution.

##### **Enrollment**

Disbursements may be made only after the school confirms enrollment.

##### **Disbursement Report**

Each term, disbursement reports will be downloaded by the institution from the Board's password protected web site:

<https://fortress.wa.gov/hecb/secure/login.asp>

It is to be completed, signed and returned to the Higher Education Coordinating Board within 30 days of disbursement, along with any warrants not disbursed to students. A **Disbursement Report** example is included in the Resource section of this manual.

##### **Power of Attorney Disbursements**

A student whose off-campus program precludes his or her return to the institution for disbursement must assign Power of Attorney to a responsible person to receive Educational Opportunity Grant payments on his or her behalf. A copy of the Power of Attorney as documentation must be kept in the student's file.

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**REPAYMENT AS  
A RESULT OF  
WITHDRAWAL –  
PUBLIC**

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Repayment is a student responsibility. If a student recipient leaves school during an academic term in which he or she receives an Educational Opportunity Grant, the student is required to repay Educational Opportunity Grant funds according to the institution's Board-approved repayment policy.

**Institutional  
Responsibility**

Collection is the school's responsibility. In conducting the collection, the school should follow the same procedure it uses for collecting repayment of other grant funds such as Pell or SEOG.

**Uncollectibles**

An "uncollectible" account may be turned over to the Board. In general, "uncollectible" is defined as the student's failure to make any repayment for 120 days or more.

If the 120 days expires with no response from the student, the institution may forward the documented account to the Board. The institution may hold the account for more than 120 days if it continues active collection procedures.

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**REPAYMENT AS A  
RESULT OF  
WITHDRAWAL –  
PRIVATE**

---

Repayment is a student responsibility. If a student recipient leaves school during an academic term in which he or she receives an Educational Opportunity Grant, the student is required to repay Educational Opportunity Grant funds according to the institution's Board-approved repayment policy.

The collection effort is conducted by the Board **for students at private schools only**. The institution must advise the student and the Board, in writing of the amount to be repaid. Documentation of the student's repayment obligation must be kept in the student's file.

Educational Opportunity Grant warrants will not be processed for any student who owes a repayment that has been referred to the Board until the account has been paid in full. The Board will advise the institution, in writing, when the student has repaid the amount due.

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**INSTITUTIONAL  
RESPONSIBILITY  
FOR WARRANTS**

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The institution is responsible for the custody of all Educational Opportunity Grant warrants as long as they are held at the institution, and it is responsible for any Educational Opportunity Grant warrants which are lost, stolen, or disbursed to ineligible students.

## **Chapter V**

### **PROGRAM AUDITS AND RECORDS RETENTION**

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#### **PROGRAM AUDITS**

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The Board staff will review institutional administrative practices to determine compliance with rules, regulations, and program guidelines. As outlined in the rules, the burden of proof for a grant recipient's eligibility is with the institution. Each participating institution must keep intact and accessible records pertaining to the receipt and expenditure of Educational Opportunity Grant funds. This includes all accounting records and supporting documents necessary to verify how funds were spent.

At a minimum, the institution must be able, on request of the Board, to reconstruct the calculations and rationale supporting the student's grant eligibility. An institution may keep records on microfilm or in computer format. If the institution keeps its records in computer format, it must maintain, in either hard copy or on microfilm, source documents supporting the computer data. If such a review determines that an institution has failed to comply with program rules and regulations or guidelines, the institution must reimburse the program in the appropriate amount.

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#### **RECORDS RETENTION**

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Records relating to the Educational Opportunity Grant program must be maintained in accordance with RCW 40.14. This law requires that all documentation substantiating a student's eligibility for, and receipt of, Educational Opportunity Grant funds must be maintained for six years.

Financial Aid Administrators at public institutions must coordinate their records retention plan and schedule with their institution's records officer.

## **LIST OF RESOURCES**

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## GENERAL WEB SITE INSTRUCTIONS

EOG Disbursement Reports are available for downloading off the Board's web site for Financial Aid Professionals. The web site data is updated every 24 hours.

### Web Site Registration Instructions

The site is password protected because the data contains sensitive student information. You must register and receive access confirmation before the files can be viewed or downloaded.

To register, go to: <https://fortress.wa.gov/hecb/secure/login.asp>

- Click on the "Register" button
- Fill in the registration information
- Password must be at least eight characters in length, contain at least one numeric, one alpha and one of these three special characters: @, #, or \$ (example: instruct#1)
- You will be contacted for verification purposes and notified when access has been activated

### Accessing Web Site Data

#### EOG Disbursement Reports

After you receive notification of access:

- Go to <https://fortress.wa.gov/hecb/secure/login.asp> to log onto the web site
- Enter your complete e-mail address and the password you supplied at registration
- A "HECB MENU" page will appear displaying the web pages you have access to
- Click on the web page you wish to view. (*The length of time that it will take to open the web page will depend on your individual computer and internet browser*)
- If downloading Disbursement Reports, select "EOG Disbursement Data"
- On the "EOG Search Criteria" page, use the drop down boxes to select a year, term, and disbursement status
- If searching for a specific student, you may enter the student's SSN or last name in the boxes provided
- If you would like to download your query into an Excel file, click on the box marked "Download an Excel file of this query"
- Once all search criteria is entered, click on the button marked, "Search For Eligible EOG Students"

## **Downloading a Disbursement Report**

To download a disbursement report from the web:

- Log on to web site
- Select “EOG Disbursement Data”
- Perform search according to your selection criteria
- Click on “Create a Printable Disbursement Report”
- A Print menu will automatically pop up select print. If the disbursement report is too wide for the page, click the cancel button on the printing menu, select File, Page Setup and change the printing format to landscape.
- Print disbursement report

To complete your disbursement report in an Excel file to be uploaded as a signature-less form:

- Log on to web site
- Select “EOG Disbursement Data”
- Enter search criteria
- Click box marked “Download an Excel file of this query” on search criteria page
- Fill in the column marked “Disbursement Status” with the appropriate disbursement coding
- Go back to the web site’s Main Menu
- Click on Signature-less Document Submission under “Communications Menu”
- Follow directions on page

## **Renewal Forms**

To complete an EOG Renewal Form:

- Log on to web site
- Select “EOG Forms and Memos”
- Select “2004-05 EOG Renewal Form”
- Follow directions on page

## **Secure E-Mail**

To send an e-mail with sensitive student information:

- Log on to web site
- Select “Secure E-Mail” from Main Menu
- Select “Educational Opportunity Grant” from the Recipient drop down box
- Type a subject in the subject line provided
- Type a message in the Message box provided
- When E-mail is complete, click button “Send E-mail”

Data last updated on 4/23/2004 7:15:42 AM [ [Click for Help](#) ]

EOG Search Criteria			
Institution	<input type="text" value="All Institutions"/>		
Year	<input type="text" value="All Years"/>	Term:	<input type="text" value="All Terms"/>
Disbursement Status	<input type="text" value="All Statuses"/>		
Date Paid: From <input type="text"/> To <input type="text"/> <i>Date Format: 9/15/2002</i>			
SSN	<input type="text"/>	Last Name	<input type="text"/>
<input type="checkbox"/> Display search criteria with search results.			
<input type="checkbox"/> Download an Excel file of this query (will not display results on screen).			
<input type="button" value="Search For Eligible EOG Students"/>			



**HIGHER EDUCATION COORDINATING BOARD  
EDUCATIONAL OPPORTUNITY GRANT DISBURSEMENT REPORT  
4/23/2004**

Please determine student eligibility prior to disbursing. Return all undisbursed payments to the HECB.

Please print and complete column marked "Disbursement Status"

**Educational Opportunity Grant Eligibility Requirements**

Payments may be disbursed to grant recipients who continue to meet the following eligibility requirements:

1. Student has an Associates Degree or has achieved at least Junior standing.
2. Student has demonstrated financial need for the grant.
3. Student is maintaining satisfactory progress as determined by the institution.
4. Student is enrolled at least half-time for the current term.
5. Student will not, for the duration of the academic year during which the grant is disbursed, be enrolled in any classes that include any religious worship, exercise or instruction, or be pursuing a degree in religious, seminarian or theological academic studies; and further is precluded, by the institution for the duration of the academic year during which this grant is disbursed, from enrolling in any classes determined by the institution to include any religious worship, exercise, or instruction, or from pursuing a degree in religious, seminarian or theological academic studies.

Disbursement Code Table	
Code	Description
D	Disbursed to eligible student
C	Student enrolled less than half time
U	Unsatisfactory Progress
J	Not Junior standing
W	Withdrawn
F	Failed to enroll
O	Other (please explain)
N	No Need

**EOG Student List**

HECB									Institution	
Year	Term	Eligibility Year	SSN	Name	Institution	Payment	Date Initiated	Warrant Number	Warrant Date	Disbursement Status
2003-04	Winter	1		PARSONS	University of Puget Sound	\$1,250.00	12/29/2003	757274Q	12/30/2003	Disbursed
2003-04	Winter	1		HAMM	University of Puget Sound	\$1,250.00	12/29/2003	757273Q	12/30/2003	Disbursed
2003-04	Winter	2		RODRIGUEZ	University of Puget Sound	\$1,250.00	12/29/2003	757277Q	12/30/2003	Disbursed
		<b>Total Students:</b>		<b>Total HECB Payments: \$</b>						

**Comments:**

I hereby certify that the marked statement is a true and accurate report of the status of Educational Opportunity Grant Program recipients for the term indicated.

**Authorized Signature:**

**Date:**

**Printed Name:**

### Secure And Signatureless Form and Document Submission

Secure Form and Document Submission replaces the existing "Secure File Upload" utility for the purpose of sending the Board forms without signatures. By using this utility (along with the Electronic Access Agreement that your institution signed) you are able to submit forms electronically *without* a physical signature.

#### To upload a form to the HECB:

1. Choose the form you wish to upload from the drop-down list. If you do not see the form you wish to upload, you may not have permission to submit that form, so please notify your Institutional Administrator (usually the Financial Aid Director).
2. Select the file (from your own computer) to upload by clicking on the 'Browse...' button below.
3. Add notes and a brief description of the form contents you are uploading.
4. Include your phone number in case we have any questions.
5. Click on the Upload Form button below

**Form To Upload:**

SELECT A FORM/DOCUMENT

**Form Location:**

Browse...

**Form Notes:**

**Phone Number:**  
In case of questions.

Upload Form



## **EDUCATIONAL OPPORTUNITY GRANT - PROGRAM ADMINISTRATION**

Search Criteria	
Last name or SSN:	<input type="text"/>
Current Institution:	<input type="text" value="All Schools"/> ▼
Latest Payment Year:	<input type="text" value="All Years"/> ▼
Display Quarters and Semesters:	<input type="checkbox"/> Paid <input type="checkbox"/> Committed <input checked="" type="checkbox"/> Total <input checked="" type="checkbox"/> Available
<input type="checkbox"/> Show Student's Application Year in Results	
<input type="checkbox"/> Show Student's Latest Year and Term Paid	
<input type="checkbox"/> Display Search Criteria on Results Page	
<input type="checkbox"/> Generate Renewal Form	
<input type="checkbox"/> Save The Results as an Excel Spreadsheet	
<input type="checkbox"/> HECB Only: Show Students Addresses	
<input type="button" value="View Students"/>	

Color Key to Quarters and Semester Figures			
Used	Committed	Total Used and Committed	Remaining Available



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***PLEASE READ THIS ENTIRE INFORMATION SHEET BEFORE COMPLETING THE APPLICATION.***

■ **WHAT IS THE EDUCATIONAL OPPORTUNITY GRANT?**

The Educational Opportunity Grant (EOG) program provides renewable \$2,500 grants to financially needy placebound Washington residents as an incentive to complete their four-year degrees at eligible public and independent colleges and universities. The Educational Opportunity Grant was created by the Washington State Legislature to raise upper-division participation rates by encouraging placebound students who have already achieved junior standing through completion of an Associate of Arts or Associate of Science degree, or transferable credits, to complete a four-year degree.

■ **WHO QUALIFIES FOR THE GRANT?**

To apply for this grant, you must be “placebound” and meet other eligibility requirements.

- “Placebound” is defined as having completed only the first two years of a four-year degree due to family or employment commitments, health concerns, financial need, or other similar factors.
- You must be a Washington resident.
- Before your first term of enrollment at the four-year school, you must **have achieved junior standing** as recognized by the school you plan to attend, either by completing an Associate of Arts or Associate of Sciences transfer degree program, or through earned credits.
- You must demonstrate financial need certified by the financial aid administrator at the college you plan to attend (**this means you must have completed all institutional financial aid applications and the federal financial aid form – Free Application for Federal Student Aid (FAFSA); if you have Internet access, you may complete a FAFSA online at: <http://www.fafsa.ed.gov>**).
- You must be planning to attend an **eligible** four-year school in Washington. To be eligible, schools must be accredited by the Northwest Association of Schools and Colleges (NWASC); or a branch campus of a member institution accredited by Middle States Association of Colleges and Schools, New England Association of Schools and Colleges, North Central Association of Colleges and Schools, or Western Association of Schools and Colleges that meet other specified criteria and participate in other state financial aid programs.
- You must be a junior or senior transfer student in 2004-2005, and must not have been enrolled during the prior academic year at the four-year school you plan to apply and attend with this grant.

■ **WHICH SCHOOLS CAN I ATTEND WITH THE GRANT?**

Four-year schools currently meeting the program’s requirements are: Antioch University, Bastyr College, Central Washington University, Cornish College of the Arts, Eastern Washington University, The Evergreen State College, Gonzaga University, Henry Cogswell College, Heritage College, Northwest College, Pacific Lutheran University, Saint Martin’s College, Seattle Pacific University, Seattle University, University of Puget Sound, University of Washington, Walla Walla College, Washington State University, Western Washington University, Whitman College, and Whitworth College.

The institution you attend must not require you to be involved in any educational program that includes any religious worship, exercise or instruction.

■ **HOW MUCH WILL I RECEIVE IF I AM ELIGIBLE FOR A GRANT?**

The grant will be \$2,500 for the academic year and is renewable for one year. *If you attend less than the full academic year or if your financial need as certified by your school is less than \$2,500*, your grant amount will be adjusted downward. For students attending a quarter school, the intended maximum is six quarters. For students attending a semester school, the intended maximum is four semesters. Students with extenuating circumstances may petition for additional terms of funding, as funds remain available.

■ **WILL I RECEIVE THE GRANT IN ADDITION TO OTHER FINANCIAL AID?**

If your need, as documented by the federal student aid report, is not met by other financial aid sources, the Educational Opportunity Grant can be added to your financial aid package. If your need is fully met by other financial aid, then the Educational Opportunity Grant will replace loans, not grants or scholarships.

■ **HOW DO I SUBMIT MY APPLICATION FOR THE GRANT?**

The application form has three parts. You must complete parts A & B; the financial aid administrator at the college you plan to attend must complete Part C. Submit Part C to your financial aid administrators immediately to allow time for completion. If you apply to more than one school, please submit one application for each school you are considering.

■ **HOW WILL RECIPIENTS BE SELECTED?**

Complete applications will be reviewed continuously, beginning April 1, 2004 until May 30, 2005, as long as funds remain available. Priority will go to the earliest complete applications. Complete applications are scored based on placebound status and financial need.

■ **WHEN SHOULD I SUBMIT MY APPLICATION?**

*You must apply before your initial term of enrollment at the four-year school you plan on attending.*

☐ I plan to begin attendance **fall term 2004**. Apply between April 1, 2004 and September 1, 2004.

☐ I plan to begin attendance **winter term 2005**. Apply between April 1, 2004 and February 1, 2005.

☐ I plan to begin attendance **spring or summer quarter 2005**. Apply between April 1, 2004 and May 1, 2005.

■ **HOW WILL I BE NOTIFIED IF I RECEIVE AN AWARD?**

A notice of award, or non-award, will be sent to you and to your financial aid office when your application has been reviewed.

■ **HOW DO I REMAIN ELIGIBLE?**

Students remain eligible within an award period as long as the institution can certify you continue to be in good standing including making satisfactory academic progress.

■ **CAVEATS**

- ◆ Awards are **provisional** until schools can confirm student eligibility just prior to disbursement of funds.
- ◆ Program funding and program eligibility criteria depend upon legislative provisions and appropriation.

■ **AGENCY CONTACTS**

Dawn Cypriano-McAfertry, Program Coordinator  
Linda Langan, Program Manager  
Fax: (360) 704-6246 or (360) 753-7808

[dawnc@hecb.wa.gov](mailto:dawnc@hecb.wa.gov)

[lindala@hecb.wa.gov](mailto:lindala@hecb.wa.gov)

(360) 753-7846

(360) 753-7861

**Higher Education Coordinating Board**

Educational Opportunity Grant

917 Lakeridge Way

PO Box 43430

Olympia, WA 98504-3430

<http://www.hecb.wa.gov/paying/waaidprgm/eog.asp>

**WASHINGTON STATE  
EDUCATIONAL OPPORTUNITY GRANT  
2004–2005 APPLICATION**

**HECB USE ONLY**

Fall 04 \_\_\_\_\_

Winter 05 \_\_\_\_\_

Spring 05 \_\_\_\_\_

Summer 05 \_\_\_\_\_

**INSTRUCTIONS**

This application consists of three parts: **You must complete Parts A and B**, typed or legibly written in ink and return it to the Higher Education Coordinating Board. Send Part C to the four-year school you plan to attend as a junior. Your school will complete Part C and will forward it to the Higher Education Coordinating Board for processing. **(NOTE: You must have completed the admissions process and the FAFSA before your financial aid administrator can complete Part C. See page one of the information sheet.)** If you are considering more than one school at this time, please complete a separate application for each school.

**DEADLINE:** While funds remain available, applications will be reviewed on a first-come, first-served basis beginning April 1, 2004, and ending June 1, 2005 (Please refer to the Application Information Sheet for specific deadlines related to the term you intend to enroll at a four-year school.)

**PART A – TO BE COMPLETED BY STUDENT**

1. Name: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Last First Middle
2. SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
3. Birthdate: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Male ☐ Female ☐
4. Phone: ( \_\_\_\_ ) \_\_\_\_\_
5. E-Mail address: \_\_\_\_\_
6. 2004-05 Terms of enrollment (Mark ALL that apply): Fall 04 ☐ Winter 05 ☐ Spring 05 ☐ Summer 05 ☐
7. Permanent residence: \_\_\_\_\_  
Street City State Zip
8. Address while attending college: \_\_\_\_\_  
(if different) Street City State Zip
9. Date I became a legal resident of Washington: \_\_\_\_\_ / \_\_\_\_\_  
(If you have always lived in this state, use your date of birth.) Month Year
10. Indicate the schools you are considering attending, in order of preference, during the 2004-05 school year.

College	Main Campus	Branch Campus / Extended Learning Center (Please list site)
1) _____	<input type="checkbox"/> OR <input type="checkbox"/>	_____
2) _____	<input type="checkbox"/> OR <input type="checkbox"/>	_____
3) _____	<input type="checkbox"/> OR <input type="checkbox"/>	_____

**NOTE: YOU MAY NOT USE THIS GRANT TO CONTINUE AT YOUR CURRENT INSTITUTION.**

12. List **all** colleges or universities you have previously attended in the space below.

<u>College</u>	<u>Location</u>	<u>Dates Attended</u>	<u>Degree</u>	<u>Degree Date</u>

(Attach a list of any additional colleges if necessary.)

13. Academic major: \_\_\_\_\_

14. Estimated baccalaureate graduation date: \_\_\_\_\_

15. Planned enrollment status for 2004-2005: Full-Time ☐ Other ☐ \_\_\_\_\_  
(Explain)

16. Amount of educational loans to date (student only – Stafford/Perkins Loans):

Amount borrowed: \$ \_\_\_\_\_ Current unpaid balance: \$ \_\_\_\_\_

17. You **must have** completed the **Free Application for Federal Student Aid (FAFSA)** form and applied for admission in order for your financial aid administrator to complete Part C of this application. Check with the college you plan to attend for further instructions about completing the financial aid process. **If you have Internet access, you may apply on-line at: <http://www.fafsa.ed.gov>**

☐ I **have** applied for admission.

☐ I **have** applied for financial aid.

☐ I **have not** applied for financial aid, but will contact my financial aid office.

**RELEASE OF INFORMATION:** The HECB may release your name, the college you previously attended, and the names of the college(s) you entered on question #10 to interested parties such as news media, legislative personnel and to the college you previously attended for the purpose of recognizing the accomplishments of grant recipients. Please check here **ONLY** if you do not wish this information to be released. NO \_\_\_ I do NOT authorize the HECB to release my information for the purpose of recognition.

**STUDENT AGREEMENT:** By my signature, I certify that the information contained in Parts A and B of this application is true and correct to the best of my knowledge. Further, I give my consent to the financial aid administrator at the college I plan to attend to release necessary demographic and financial information to assist in the Higher Education Coordinating Board's administration of the program. I certify that, according to the definition provided and to my answers on Part B, I am a placebound citizen. During the entire period I receive the Educational Opportunity Grant, I understand I cannot be required by my college or university to be involved in any program or class that includes any religious worship, exercise or instruction.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Please Print Name

Send completed application to:

**Educational Opportunity Grant Program  
Higher Education Coordinating Board  
917 Lakeridge Way / PO Box 43430  
Olympia, WA 98504-3430**

**EDUCATIONAL OPPORTUNITY GRANT  
2004–2005 APPLICATION  
PART B – “PLACEBOUND DESCRIPTION”**

For this grant program, a “**placebound person**” is defined as one who:

- Has junior standing through the completion of an Associate of Arts or Sciences degree; **or** has transferable credits equal to junior standing at the four-year school you plan on attending with this grant.
- Has been unable to complete a college program because of family or employment commitments, health concerns, monetary inability, or other similar factors.
- Would be able to complete their bachelor’s degree with the help of this grant.

**Please mark the “Yes” or “No” box by each statement as it applies to your plans to attend a four-year school. Explain special circumstances on the reverse side.**

**Y    N**

- ☐ ☐ I am the caregiver for an elderly or disabled family member. (Explain)
- ☐ ☐ I will continue to work at my current job.
- ☐ ☐ I am a homeowner.
- ☐ ☐ I will be moving out of the area, approximately \_\_\_\_\_ miles, to attend school.
- ☐ ☐ I am returning to school this term after an absence of one or more years.
- ☐ ☐ I have a documented medical condition that requires continued care by my local doctor.
- ☐ ☐ Family or friends will assist me with childcare while I am in school.
- ☐ ☐ My spouse will be continuing in a permanent job.
- ☐ ☐ There are no public or private four-year colleges within reasonable commuting distance of my current residence (approximately 1 hour or 50 miles).
- ☐ ☐ My dependent(s) has a documented medical condition that requires continued care by a local doctor.
- ☐ ☐ I will continue to live in my current government-subsidized, low-income housing. (Does not include dormitories.)
- ☐ ☐ The four-year school I am applying to offers an academic/degree program not available within commuting distance of my current residence (approximately 1 hour or 50 miles). The degree program is \_\_\_\_\_.
- ☐ ☐ My children will be enrolled in the same daycare or school as at present.
- ☐ ☐ The cost of moving has prevented me from going to a four-year college out of the area.

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
(Please Print)

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

**Student Instructions** – Fill in your name and Social Security number and forward Part C to the Financial Aid Office at the four-year school you would like to attend with this grant. If you are considering more than one school at this time, copy this form and send it to each school.

**School Instructions** – Part C information must be based on the applicant’s SAR. Financial aid information will be used to determine applicant eligibility and to supplement the demographic database for recipient profiles. Complete applications will be continuously reviewed for eligibility while funds remain. **Final dates to apply:** **Fall – September 1, 2004; Winter – February 1, 2005; Spring or Summer quarter – May 1, 2005.**

8. Ethnicity:    ☐ White/Caucasian                      ☐ Asian/Pacific Islander                      ☐ Black/African American  
                    ☐ American Indian                      ☐ Eskimo                      ☐ Hispanic/Spanish  
                    ☐ Other                      ☐ Aleut                      ☐ Unknown/Unavailable

9. Comments: (Please add anything that would help clarify the student's status; for example lack of sufficient transfer credits, lack of admission status, re-determination of need, selected for verification, or current student.)

10. By my signature, I certify that the information contained and requested in **Part C** of this application is true and complete to the best of my knowledge.

\_\_\_\_\_  
Signature of financial aid administrator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Institution

**WASHINGTON STATE  
EDUCATIONAL OPPORTUNITY GRANT  
PETITION FOR FUNDING ABOVE NORMAL LIMITS**

*In cases of extenuating circumstances, a student who has received the EOG for six quarters or four semesters, may petition for two additional terms of funding. **Completing the petition and application is not an assurance that approval will be given. Limits in program funding mean only a few exceptions can be granted.***

The renewal application consists of three parts.

- **Part A** – You must complete questions 1-13 and attach your letter of petition.
- **Part B (Petition)** – Your written statement should:
  - Demonstrate the extenuating circumstances you have experienced
  - Explain the effect on your educational goals if you do or do not receive the grant
  - Include any other information you feel relevant
- **Part C (Financial Aid Worksheet)** – To be completed by the financial aid administrator at the college you plan on attending with your grant. Please fill in your name and social security number in the spaces provided on the reverse of this form before sending Part C to the financial aid office.

THIS APPLICATION MUST BE RECEIVED BY THE HIGHER EDUCATION COORDINATING BOARD AT LEAST TWO MONTHS PRIOR TO THE TERM IN WHICH YOU ARE REQUESTING THE ADDITIONAL FUNDING.

**PART A – PLEASE TYPE OR PRINT NEATLY**

1. The academic year and term I would begin to use the additional funding is \_\_\_\_\_  
(Year ie: 2004-05) (Term)
2. The terms I am requesting include: ☐ Fall ☐ Winter ☐ Spring ☐ Summer **(Not to exceed two terms)**
3. Full Name \_\_\_\_\_
4. SSN \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ 5. Phone (\_\_\_\_) \_\_\_\_\_
6. E-Mail Address \_\_\_\_\_
7. Mailing Address: \_\_\_\_\_  
Street  
\_\_\_\_\_  
City State Zip  
Has the above address changed in the past year? ☐ Yes ☐ No
8. Permanent Address \_\_\_\_\_  
Street  
\_\_\_\_\_  
City State Zip  
Has your permanent address changed in the past year? ☐ Yes ☐ No
9. The college I currently attend is: \_\_\_\_\_
10. The college I plan to attend with my grant extension: \_\_\_\_\_
11. My major is: \_\_\_\_\_
12. My estimated baccalaureate degree graduation date is: \_\_\_\_\_
13. Prior educational debt (student only):  
Amount borrowed: \$ \_\_\_\_\_ Current unpaid balance: \$ \_\_\_\_\_

**PETITION:** Attach your written statement, no longer than one typed page, describing the reasons you should be considered for additional terms of funding.

☐ Yes, my petition for additional terms of funding is attached.

**STUDENT AGREEMENT:** By my signature, I certify that the information contained in Part A of this application is true and correct to the best of my knowledge; further, I give my consent to the financial aid administrator at the college I plan to attend to release necessary demographic and financial information to assist in the Board's administration of the program. I certify that according to the following definition, I am a placebound citizen. I understand that if I receive the grant, I cannot be required by my college or university to be involved in any program that includes any religious worship, exercise or instruction; and that I cannot be pursuing any degree in religious, seminarian, or theological academic studies. I understand if I am selected to receive the grant, it can only be used during the terms for which I am applying at a Board approved institution.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please submit your application to the school you plan on attending with the grant. You will be notified of your award or non-award status by the Higher Education Coordinating Board once your application is processed. Contact Dawn McAferty at [dawnc@hecb.wa.gov](mailto:dawnc@hecb.wa.gov) or (360) 753-7846 if you have any questions.

\*\*\* SEE REVERSE\*\*

EDUCATIONAL OPPORTUNITY GRANT  
PETITION FOR FUNDING ABOVE NORMAL LIMITS  
PART C – FINANCIAL AID WORKSHEET

**Student Instructions** – Fill in your name and Social Security number and forward the application to the Financial Aid Office at the four-year school you plan to attend with this additional funding.  
Name: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
*(Last) (First) (MI)*

**School Instructions** – Part C information must be based on the applicant’s SAR. Financial aid information will be used to determine applicant eligibility and to supplement the demographic database for recipient profiles. Applications will be continuously reviewed for eligibility while funds remain available.

\*\*\* FOR SCHOOL USE ONLY \*\*\*

1. Budget:
- A. Type: ☐ Dependent, lives with parents  
☐ Dependent, lives away from parents  
☐ Independent, unmarried, no dependents  
☐ Independent, unmarried, with dependents  
☐ Independent, married, no other dependents  
☐ Independent, married with dependents
- B. Budget duration, if less than nine months: \_\_\_\_\_
- C. Budget amount: \$ ,
2. Family income: (Annual taxed and untaxed income upon which the contribution is calculated.)
- A. Parent income (if dependent student): \$ ,
- B. Student income (if dependent or independent): \$ ,
- C. Spouse’s income from work (if married): \$ ,
3. Total expected family contribution: \$ ,
4. Financial need based on budget in Item #1: \$ ,
5. Family size: \_\_\_\_\_ Number in college: \_\_\_\_\_
6. Washington resident: ☐Yes ☐No. If applicant is not a Washington resident, but anticipates residency during the academic year, which term? \_\_\_\_\_
7. Class standing: Applicant must have received an Associate of Arts or Sciences degree or achieved junior status to receive an Educational Opportunity Grant.
- A. Associate of Arts or Sciences Degree: ☐Yes ☐No ☐Unknown at this time
- B. Class standing at beginning of the student’s initial term of enrollment during the \_\_\_\_\_ academic year:  
Junior: \_\_\_\_\_ Senior: \_\_\_\_\_  
*(Year)*
8. Ethnicity: ☐ White/Caucasian ☐ Asian/Pacific Islander ☐ Black/African American  
☐ American Indian ☐ Eskimo ☐ Hispanic/Spanish  
☐ Other ☐ Aleut ☐ Unknown/Unavailable
9. Comments: (Please add anything that would help clarify the student's status; for example lack of sufficient transfer credits, lack of admission status, re-determination of need, selected for verification, or current student.)

10. By my signature, I certify that the information contained and requested in **Part C** of this application is true and complete to the best of my knowledge.

Signature of financial aid administrator \_\_\_\_\_ Date \_\_\_\_\_

Print name \_\_\_\_\_ Institution \_\_\_\_\_

Please mail completed application to:

**Higher Education Coordinating Board  
Educational Opportunity Grant Program  
Attention: Dawn McAferty  
PO Box 43430  
Olympia, WA 98504-3430**

**PROFILE OF EDUCATIONAL OPPORTUNITY GRANT RECIPIENTS BY SECTOR, 2002-2003**

	<b>TOTAL, All Institutions</b>	<b>4-Yr Public Institutions</b>	<b>Independent Institutions</b>
<b>Percentage of All Recipients</b>	100%	64%	36%
Number	1,028	655	373
<b>Age</b>			
Under 21	6%	6%	4%
21-23	23%	25%	21%
24-29	32%	31%	34%
30-34	15%	14%	15%
35-39	8%	8%	9%
40 and Over	17%	16%	18%
Median Age	27	27	27
<b>Gender</b>			
Male	31%	33%	27%
Female	69%	67%	73%
<b>WA Residency</b>			
Resident	100%	100%	100%
Nonresident	0%	0%	0%
<b>Fall Term Enrollment Status</b>			
Fulltime	93%	93%	91%
Less Than Fulltime	8%	7%	9%
<b>Year in School</b>			
Freshmen	1%	0%	2%
Sophomore	7%	0%	17%
Junior	36%	37%	32%
Senior	55%	61%	44%
5th Year/Unclassified	1%	0%	3%
Graduate/Prof/Other	1%	1%	1%
<b>Race/Ethnicity</b>			
Black/African American	4%	4%	5%
Asian/Pacific Islander	8%	8%	8%
American Indian	3%	2%	3%
Spanish/Hispanic	11%	9%	13%
White	65%	69%	59%
Other/Unknown	10%	9%	13%
<b>Dependent Students</b>			
Percentage of all Students	20%	22%	17%
Average Parental Income	\$33,128	\$31,271	\$37,222
Average Family Size	4.1	4.0	4.4
Average Exp. Family Contrib	\$3,874	\$3,494	\$4,712
<b>Independent Students</b>			
Percentage of all Students	80%	78%	83%
Average Family Income	\$20,306	\$19,541	\$21,579
Average Family Size	2.5	2.5	2.5
Average Exp. Family Contrib	\$2,191	\$2,012	\$2,489
<b>Average Total Award</b>	\$15,825	\$13,283	\$20,289
<b>Percent of Funds (\$) by Type</b>			
Grant	59%	62%	56%
Loan	38%	36%	40%
Work	3%	2%	4%
<b>Percent of Funds (\$) by Source</b>			
Federal (including Loans)	53%	55%	50%
State	33%	39%	25%
Other	15%	6%	25%

Source: 2002-2003 Unit Record as submitted to HECB by institutions.

EDUCATIONAL OPPORTUNITY GRANT (EOG) RECIPIENTS  
*Socio-Economic Profile*  
**2003-2004 Recipients**

**BACKGROUND**

The purpose of the *Educational Opportunity Grant Program* is to provide a \$2,500 grant as an incentive to financially needy placebound residents to complete baccalaureate education and to do so at institutions, public or independent, which have existing capacity. The program carries a 2003-2004 state appropriation of \$2,867,000. The statutory authority for the program is located in Chapter 28B.101RCW. A total of 618 new student awards have been made for the 2003-2004 academic year. In addition to the new recipients, there are 521 renewals for a total of 1,139 awards for 2003-2004.

**PROFILE**

<i>School Attended:</i>	Of the EOG recipients, 63 percent attend public institutions and 37 percent attend private institutions.
<i>Average Age:</i>	The average age of recipients is 30.
<i>Gender:</i>	Most recipients are female (68 percent).
<i>Dependency Status:</i>	The majority (79 percent) of the recipients are either single parents, single independent students, or married students; only 21 percent are dependent students.
<i>Year in School:</i>	Students with junior class standing constitute 88 percent of the new recipients; 12 percent are seniors.
<i>Prior School Attended:</i>	86 percent of the recipients previously attended a community college in the state of Washington.
<i>Field of Study:</i>	The three most frequently cited majors are: Social Sciences, Education, and Business.
<i>Average Family Income:</i>	The average annual family income of recipients is \$26,020.
<i>Loan Amounts:</i>	Average previous loan amount among new recipients is \$19,306.

HECB 1/2004